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Hendriyani; Ed Hollander; Leen d'Haenens; Johannes Beentjes

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CHILDREN'S TELEVISION IN INDONESIA

Broadcasting policy and the growth of an industry

Hendriyani, Ed Hollander, Leen d'Haenens and Johannes Beentjes

This article describes the structure, conduct, and performance of children's television in Indonesia during the last four decades, reflecting on its interaction with the government, the market, and civil society. A striking trend in Indonesia's children's television is undoubtedly its exponential growth during the last 40 years, and its permanent oscillation between commercialism and idealism. Content analysis of television schedule archives (between 1970 and 2009) shows a steady increase in the volume of children's television, in line with the establishment of new commercial stations and the rise of advertising revenues in the television business. In the early days, local production outnumbered imported programs, and most of the programs were educational in scope. Nowadays, the majority of children's television programs in Indonesia are cartoons imported from the US.

KEYWORDS broadcasting policy; children's television programs; Indonesia; media policy; television industry; television regulation

Setting the Scene

With a population of over 220 million, Indonesia has the potential to become a very promising market for the TV industry. Ten commercial TV stations are broadcasting nationally, reaching more than 80 per cent of the population, especially in urban areas. Meanwhile the country's only public TV station—Televisi Republik Indonesia (TVRI)—is able to reach rural areas as well (TVRI, n.d.). Over 105 local TV stations have been established in the past 10 years. We will use "national TV" to refer to the eleven TV stations broadcasting nationally,¹ as opposed to "local TV," the private TV stations broadcasting locally.

National TV stations remain dominant in the market in spite of their small number when compared to local stations (11 vs. 105). The former take up a 98 per cent share of the total television market, leaving only 2 per cent for local stations. In order to maximize their audience share, some stations merged under the same network. According to Nielsen Media in 2008, Media Nusantara Citra (MNC) now owns RCTI, TPI, and GlobalTV, taking up 31.5 per cent of the TV market share. TransCorp, owning TransTV and Trans7, has a 19.1 per cent market share. TVOne and AnTV are owned by StarTV and the Bakrie Group, together representing 8.8 per cent of the total TV market. This article will focus mainly on national TV stations, given their market dominance in Indonesia.

Nielsen Media data also showed that one out of every five television viewers in Indonesia is a child, and children watch television for 3 hours per day on average. However, they do not exclusively watch children's television. The latter represented almost 10 per cent of the total supply of national television schedules in Indonesia. "Children's television"

here refers to programs targeted primarily at children and designed to attract primarily child viewers (Alexander, 2001, p. 495). In terms of program production, the TV industry in Indonesia divides children or young audiences into three groups to cater for: those who wear red-white, blue-white, and grey-white uniforms, referring to the colors of the school uniforms used in Indonesia: red-white for elementary school (age 5–11), blue-white for junior high school (age 12–14), and grey-white for senior high school (age 15–17). However, the industry uses Television Audience Measurement (TAM) data provided by AGB Nielsen Media Research, which defines the age group ranging from 5 to 14 years of age for children, to measure audience responses toward programs. In this article, we will employ the age categorization used by AGB Nielsen Media Research to define the young audience.

Starting from a normative media theory approach that explains how media systems should function in the context of a set of societal values (Hardy, 2008; McQuail, 2000, 2005; Yin, 2008), we will explore three aspects of children's television in Indonesia: its structure, its conduct, and its performance (see McQuail, 2005, p. 192). Structure refers to ownership, finances, the role of advertising, and relevant government regulation; conduct refers to program development and production; and performance refers to content, including diversity of content. These concepts have been used to assess the performance of the Indonesian press (Gazali, 2004; Kitley, 2000, 2003), and the Indonesian audiovisual media (Hollander, d'Haenens, & Bardoel, 2009; Sen & Hill, 2007). For instance, Gazali (2004) and Hollander et al. (2009) analyze the interactions of four entities of power that have an impact on television performance in Indonesia: the government, the market (i.e. the consumer and advertising market), civil society, and the media themselves. They conclude that most commercial TV stations are back to "business as usual" after a short coalition with civil society right after the political reform of 1998–2000. It is fair to say that children's television differs from this overall media trend in that commercial TV stations always treated it as business, before, during, and after the political reform.

Aims, Scope, and Methods

This research explores children's television in Indonesia over four decades (from 1970 until 2009). What changes occurred and what stayed the same during this period? At what point did government's regulation and civil society's pressure intervene to make a stance for children's television or, in fact, was such a point ever reached? In all, the present study aims at providing a more in-depth picture of children's television in Indonesia.

The structure of children's television is explored in the first two sections of this article; the conduct and performance will be presented in the third section. As McQuail (2005) regarded the historical context as the most fundamental source of normative expectation, we present an overview of Indonesia's television history as a context for the development of children's television in the first section of this article. The second section discusses children's television regulation in Indonesia as the outcome of interaction between the government, the market, the media, and children's media advocates (who represent civil society) as the other sources of influence in the normative theory. The last section describes children's television programming and patterns of program production over the previous four decades (1970s, 1980s, 1990s, and 2000s), referring to examples of children's television in each decade, which reflects the influences of both history and the four entities of power in media: the government, the media, the market, and civil society.

Quantitative and qualitative methods were used to obtain relevant evidence for the research questions presented in this research. Tapping the concept of “structure,” we interviewed TV station decision makers about their rationales for producing or scheduling children’s programs, as well as the role of the advertising industry and government regulation in their deliberations. As to conduct, we asked about concrete efforts to develop and produce children’s programs. Finally, concerning performance, we wondered whether diversity of content mattered, and which quality criteria and ethical concerns were believed to be important for children’s programs.

In our search for the richest possible data, a purposeful sampling technique (Patton, 2002, pp. 230–246) was used. In-depth interviews were conducted in September 2006 and from September 2007 until March 2008 with twelve key persons involved in the shaping of children’s television in Indonesia, so as to get a better understanding of the changes over time. More concretely, we interviewed a member of the Indonesian Broadcasting Commission (period 2003–2007)² who was actively involved in the drafting of the first Broadcasting Code of Conduct and the Broadcast Program Standard of 2004, outlining in detail the rules television broadcasting in Indonesia should comply with. Furthermore, three children’s program producers and two program managers from Trans7 and TVRI with the power to decide which programs should be broadcast for children were interviewed as well as the head of the Children’s Media Development Foundation,³ who has become a children’s television advocate as of 1990. We also interviewed the director of the leading TV stations: TVRI, RCTI, SCTV, TransTV, and Lativi (now TVOne) in an effort to obtain a more in-depth view of the dynamics in the children’s television industry.

In addition, a secondary quantitative analysis was carried out on the archives of TV schedules of the first week of July between 1970 and 2009 from *Kompas* daily newspaper, *Tabloid Bintang Indonesia*, *Sinar Harapan* daily, and *Pelita Harapan* daily in order to identify the volume and patterns in children’s television in Indonesia. This procedure allowed us to identify the origin of children’s television (i.e. locally produced or imported), the format broadcast (cartoon or noncartoon) as well as the amount of hours of children’s television output weekly over the program grids. The analysis of the regulation in Indonesia focused on the Broadcasting Acts of 1997 and 2002 that made it mandatory for the broadcasting industry to provide protection and empowerment to the particular audience of children and youngsters. Finally, a review of the relevant literature based upon a variety of research reports and the assessment of television audience measurement results from Nielsen Media were carried out.

A Quick Glance at the Indonesian Television Landscape

The history of television in Indonesia started with Televisi Republik Indonesia’s (TVRI) first broadcast in 1962. Owned by the state, TVRI was established for political reasons: to build Indonesia’s image in an international context (i.e. broadcast the Asian Games, a sports competition among Asian countries) and to promote national integration. The government imported 10,000 television sets and placed these in strategic locations throughout Jakarta, the capital, so that people could watch the Asian Games live. According to Kitley (2000, p. 32), this action gave television the status of “an official voice that was part of government’s elaborate public relations apparatus put in place for the Asian Games.” During the 1964–1967 period, TVRI broadcast for 3 hours per day on weekdays, 4 hours on Saturday, and only 2 hours on Sunday. Most of the programs were locally produced, such as

music shows, piano recitals, or the president's speeches. TVRI also broadcast films that were borrowed from embassies in Jakarta.

In the 1970s changes in legal status brought TVRI to its highest level of prosperity and popularity among the audience. TVRI became a public corporation (*Perusahaan Umum*, abbreviated to *Perum*) under the Ministry of Information and the TVRI Foundation. TVRI was allowed to advertise in its programs, thus creating more revenues in addition to the income from government subsidy and the license fee. Less than 30% of the total amount of TVRI's programs was imported productions (mostly films from the United States). In the 1970s, TVRI became an entertainment agent rather than a political agent (Armando, 2006, p. 105). Although it still had a mission as the government's communication medium, it was given the freedom to broadcast any kind of program as long as it did not discredit government's activities (TVRI, n.d.).

This relative independence ended in 1981 when it was decided to ban advertising from TVRI. The main argument was that the advertisements—being too urban and too western—might evoke unrealistically high expectations among the audience (Gazali, 2004, p. 58). The government restricted broadcasts of imported programs to 20% of the total program schedule (Armando, 2006, p. 115). Losing its biggest private source of income, TVRI became thus more dependent on the government in terms of financing. The government gained more control over the content of TVRI's programs, which focused more on national development issues.

The First Wave of Commercial Television

During the 1980s, TVRI started to lose its audience due to a lack of program variety, even though the potential audience for television had increased tremendously. According to Biro Pusat Statistik (BPS—Statistics office), there were only 12,931 TV sets in Indonesia in 1970. That number had increased to 7.6 million sets in 1990 (Gazali, 2004, p. 54).⁴ During that period, Indonesia's growing economy led to the industry clamoring for more advertising space directed at eager consumers of the new rising middle classes.⁵

As a result of pressure from the business industry, the government issued a license for the country's first commercial TV station in 1987, Rajawali Citra Televisi Indonesia (RCTI), which went on the air in 1989 as pay-TV. However, after 1991 RCTI became free-to-air, which ended the monopoly of TVRI. Within 2 years, another four commercial TV stations started broadcasting nationally: SCTV (Surya Citra Televisi), Indosiar, AnTV, and TPI (Televisi Pendidikan Indonesia). All these commercial stations are owned by individuals close to former President Suharto's inner circle (e.g. sons, daughters, and stepbrother).

The competition between TV stations created a highly dynamic television industry in the 1990s which had as its main goal to access audiences and advertising revenues. The number of TV sets had increased to twenty million in 1997 (Gazali, 2004, p. 54), almost three times the number of TV sets in 1990, a very large potential business market. In this period "commercial television began to re-image its audience, distancing itself from the unitary construct of the New Order cultural project and addressing its audience in terms of commercial demographics," as Kitley (2003, p. 103) pointed out.

Although the government banned commercial stations from producing their own news programs (TVRI still had the monopoly of news programs), the commercial TV stations found other ways to attract viewers. They broadcast soap operas, drama series, sitcoms, and "soft news," which "drew away audiences from the state-owned TVRI"

(Hollander et al., 2009). They also imported some well-known series from the US such as *Growing Pains*, *X-files*, *Ally McBeal*, and *Beverly Hills 90210*. Broadcasting almost 24 hours per day, the TV industry received more than US\$450 million per year from advertising in the 1990s, no less than 50 per cent of the total media spending (Persatuan Perusahaan Periklanan Indonesia [PPPI], 2003).

In 1998 the Indonesian TV industry was hit hard by the economic crisis, the same crisis that forced President Suharto to resign in May 1998 after 32 years in power. National TV stations had to reduce broadcasting time and import fewer programs due to the decreased value of the Indonesian currency. They began to produce their own soap operas, variety shows, quizzes, and newscasts in order to be more economical. The industry managed to survive the crisis.

The Second Wave of Commercial Television

After the year 2000, another five national commercial stations entered the scene: MetroTV, GlobalTV, TransTV, TV7, and Lativi. The owners of this second wave of TV stations came from different backgrounds, compared to the first wave, as none were closely related to the president. For example, TransTV is owned by Chairul Tanjung, who focuses on banking, retail, restaurants, and resorts. In 2006, TransTV took ownership of TV7 and changed its name to Trans7 after the acquisition. Lativi, previously owned by Latief Corporation, was bought by the Bakrie Group, a family corporation focusing on property, finance consultancy, and telecommunication. The group already owned AnTV. Later in 2006, Rupert Murdoch bought some shares in AnTV and Lativi, changing the television business in Indonesia that was traditionally owned by "local" players. In 2008, Lativi changed its name into TVOne.

In the same period, the status of TVRI changed from a state-owned station into a public television station. Now TVRI had to compete with other TV stations to gain advertising income, which proved difficult with its mere 1 per cent of television share.⁶ Notwithstanding its twenty-three relay stations across the archipelago and its claimed degree of independence from the government (Hollander et al., 2009), TVRI had a hard time changing its image from a government agent to a public service broadcaster.

Surveying the history of the TV industry in Indonesia in the past decades, market processes have shown their power by making the government change its policy, and influence the development of commercial television. Since then, the television business has grown enormously: from US\$474 million of advertising revenues per year in 1999 to US\$2.2 billion per year in 2007 (PPPI, 2008).⁷ Aside from the fact that there are now eleven national television stations with a similar primary programming schedule, except for MetroTV and TVOne who focus on news, the competition among stations also intensified in the 2000s because more than 105 local TV stations established themselves.

Children's Television Regulation in Indonesia

During the New Order period (1965–1998), broadcasting activities were carried out without any law, only by "an ad hoc series of ministerial, and more occasionally, presidential decrees" (Kitley, 2003, p. 100). The pressure on the government for a broadcasting act only got stronger after the commercial stations entered the business. Concerns about quality and quantity of children's television were raised by television advocates in seminars, research

publications, and lobbies by organizations to the government since commercial television programmers were permitted to broadcast nationally. A wide debate took place, with the media and the market on one side and civil society on the other side. Civil society kept questioning the uncertainty of TVRI's status (whether it should become public television or not), the controversy regarding the ownership of commercial TV stations, and the demand from television advocates to control the quality of television programs (i.e. sex and violent content as well as the lack of educational and children's programs; Kitley, 2000, pp. 306–312). On the other side, the media and the market tried to lobby the government to maintain the status quo. In 1996, in order to prove that they could achieve quality through self-censorship, the commercial television stations created the Forum for Communication and Coordination of Television (FKKT). FKKT agreed to reduce the number of programs with sexual and violent content, to (self-)regulate advertisements and music video clips that did "not fit with Indonesian culture and religious beliefs," and to broadcast more locally produced programs ("Enam stasiun," 1996). Finally, the government issued the Broadcasting Act of 1997.

The Broadcasting Act of 1997 created an opportunity for change in children's television in Indonesia because it explicitly stated two points. First, broadcast content should provide protection and empowerment to the particular audience of children and youth by broadcasting programs in a particular time slot (Article 32, Point 5). Second, commercial advertising content for children should consider and meet the broadcasting standard for children (Article 42, Point 6). The Act also stated that the government should establish an independent body within the Ministry of Information that has to determine the standard.

The government never issued the broadcasting regulations that would put the Broadcasting Act of 1997 into effect, however. De facto, the stations could broadcast children's programs at any time, a broadcasting standard for children's programs was never issued, and an independent body was never established. A children's television advocate analyzed the failure of the enforcement of the Act as proof of the assumption that the government (e.g. the Ministry of Information) did not provide protection to the children because it yielded to the pressure of commercial station owners who made a lot of profit with children's programs (personal communication, March 14, 2009).

The political reform in 1998, which started with the resignation of President Suharto, changed the face of the television business in Indonesia. The Broadcasting Act of 1997 was abandoned. When in 2000 the Abdurrahman Wahid Government dissolved the Ministry of Information, which held control over broadcasting, the unregulated system of television broadcast was prolonged. Later, in 2001, the Ministry was reestablished as the Ministry of Communication and Information.

Another opportunity for change appeared in 2002, when the government issued Law No. 32 concerning broadcasting (Broadcasting Act of 2002). Inspired by the Reform movement, the law provided a legal foundation for the establishment of the Indonesia Broadcasting Commission (Komisi Penyiaran Indonesia [KPI]), which has the task of controlling the broadcasting system in Indonesia, such as the frequency of television broadcasts, the ownership of the television stations, the establishment of local television stations, and the quality of television programs.

Similar to the Broadcasting Act of 1997, the Broadcasting Act of 2002 also made explicit the responsibility of television stations to empower the particular audience of children and youth, by broadcasting programs on a proper time (even though the proper time slot was not mentioned in the Act) and establishing a program classification

depending on the content. It also stated that TV stations should meet a broadcasting standard for children's programs, implying that the KPI has to compile a special broadcast standard for children's programs.

KPI was formed in 2003. In the same year, the commercial stations formed the Indonesian Television Broadcasting Association (Asosiasi Televisi Swasta Indonesia [ATVSI]) and published their code of ethics which stressed their ability to regulate themselves (*Indonesian Television Broadcasting Association Code of Ethics*, 2003). The Code mentions children's television in two instances: (1) members of ATVSI will have an internal censor for their program and advertising output in an effort to prevent damage from occurring to children, and (2) members of ATVSI see to it that children's broadcasts bring added value to children's development. The Association refused to comply with the Broadcasting Code of Conduct (Pedoman Perilaku Penyiaran [P3]) and the Broadcast Program Standard (Standar Program Siaran [SPS]) that was issued by KPI in 2004, saying that it was invalid since it was only a decree and not a regulation. The Association requested a judicial review from the Supreme Court and won the case; KPI had to withdraw the decree.

For children's television advocates, the P3-SPS of 2004 was a step forward in their efforts to protect children from television content, but it also showed the compromise between the government, the media, and the market. KPI rejected the proposal of a broadcasting standard for children's programs, stating that the standard was already included in P3-SPS of 2004. "Several points in the draft of P3-SPS 2004 vanished when it was issued, for example the child-viewing hours, the classification for preschool children (2–5-year-olds), and the absence of advertisements in children's programs," recalled our informant, the children's media advocate (personal communication, March 13, 2009). The decree sketched the contours of violent and sexual content, and launched a classification system of children's (Anak [A]) programs as programs for audiences below the age of 12, and teen programs (Remaja [R]) as programs for audiences aged 12–18. P3-SPS of 2004 also clearly stated that the maximum duration of advertising during children's programming is 20% of the total program duration.

KPI revised the decree of P3-SPS of 2004 and issued the Broadcast Program Standard (SPS) of 2007. This time the legal status of the standard was valid and the media had to comply with it. Children's television advocates considered that the standard of 2007 was no better than the previous one; the new standard even omitted the quota of advertisement in children's programs.

Referring to Australia's Children's Television Standard (CTS) of 2005 as a benchmark for successfully regulating children's television, children's television advocates suggested that KPI revise some points in the SPS 2007. First, they hoped to differentiate between children's (C) programs (i.e. people younger than 14) and preschool (P) programs (i.e. children who have not yet started school). Second, they aimed to limit the broadcast time for C programs and P programs. Third, they requested detailed rules on advertisements in C and P programs, as to the duration, the presentation, the type of advertising and the endorser in the advertising. In fact, a large part of the Australia's CTS of 2005 (and 2009) regulates advertising in C and P programs. The last point is to endorse the effort to produce high quality locally produced children's television by setting the minimum quota of locally produced children's programs (Head of Children's Media Development Foundation, personal communication, March 13, 2009). None of these points was taken up by KPI when the latest version of SPS was released in December 2009.

Moreover, KPI cannot sanction any violation given the different interpretations of the Broadcasting Act of 2002 concerning the authority to sanction; either KPI or the Ministry of Communication and Information. This confusion is beneficial to the television industry. Broadcasters are safe as long as things do not get out of hand or provoke public protest, as happened in 2006 when thirteen children were injured (or died) in several regions throughout Indonesia because they imitated the so-called "SmackDown" fighting style with their friends or siblings. *SmackDown!* was a wrestling program from the US, broadcast by Lativi almost every day at 9.00 p.m. Although it was broadcast late in the evening, it was very popular among children, endorsed by the video game format. The incident provoked such public pressure that Lativi was forced to cancel the program ("Lativi dikenai sanksi," 2006). Regardless of this case, the regulation on children's television in Indonesia is more favorable to the media and the market; civil society has not much say in it.

Patterns of Children's Television Programs and Production over Four Decades

The lack of regulation of children's programs has given rise to the need for TV stations to exercise self-regulation. This laissez-faire policy has certainly had a positive impact on the production of children's television output in Indonesia. Analysis of television schedules over the decades revealed that the production of children's television gradually increased, along with the development of the broadcasting industry in Indonesia. By way of an example, Nielsen Media released data showing that from 2006 until 2008 children's programs generated 6 per cent of the total program revenues, which is more than the revenues of sport programs.

In the first decade of television broadcasting in Indonesia, the 1960s, TVRI as the only television station did not provide children's programs. Television was a luxury which audiences could access in a collective environment such as community centers or government offices. When children's television programs in the United States were already synonymous with cartoons (Alexander, 2001, p. 496), children's television in Indonesia did not even exist.

The 1970s: The Start of Children's Television

With the number of TV set owners increasing in the 1970s, watching television became a more integrated part of family life in Indonesia. TVRI broadcast children's programs between 6.00 p.m. and 7.00 p.m. on weekdays and in the morning on Sundays.⁸ The average duration of children's television in the 1970s was 6.8 hours per week (see Table 1).

TABLE 1

Children's television output (in hours per week, type, and origin during four decades).

Decade	Average number of hours per week	Type (%)		Production (%)	
		Cartoon	Noncartoon	Indonesia	Imported
1970–1979*	6.8	25	75	63	37
1980–1989*	6.6	8	92	86	14
1990–1999**	34.6	37	63	45	55
2000–2009***	137.7	73	27	18	82

*Data were available for 6 years. **Data were available for every year. ***Data were available for 9 years.

Although the output fluctuated over the years, more than half of the programs were locally produced, mostly consisting of musical or educational programs such as singing competitions, dancing performances, or language learning (English, German, Indonesian, and others). Most of the imported programs came from the United States, consistent with the origin of programs for older audiences. All of the imported programs were entertainment such as *Popeye the Sailor Man*, *Woody Woodpecker Show*, *Bozo the Clown*, and Disney movies, but the majority of children's television was noncartoon.

A TVRI production manager whom we interviewed explained that in the 1970s TVRI children's programs were very popular. TVRI received a lot of positive appraisal from the audience, especially for its in-house productions such as *Mari Menyanyi (Let's Sing)*, *Lagu Pilihanku (My Chosen Songs)*, and *Taman Kanak-Kanak (Kindergarten)*. He recalled: "[i]t was simple. We produced a kind of variety show for children: singing, dancing, playing in one show. We had budget to do that and we didn't have a competitor" (personal communication, January 27, 2007).

The 1970s turned out to be the decade in which TVRI started to broadcast children's programs regularly with enough money to buy imported programs as well as to produce in-house. The media and the government controlled children's television in this decade.

The 1980s: Everybody Loves Unyil

Because of the government control, children's television during the 1980s was mostly locally produced (see Table 1). Noncartoon programs—such as children's drama, drawing, singing competitions, music and dance performances, and educational programs—dominated children's television in those years. The duration of each program was usually 25–30 minutes, broadcast 4.30–6.00 p.m., earlier than the time slot during the 1970s which started at 6.00 p.m. On Sundays, children's television was broadcast in the morning and in the afternoon. The average amount of children's television in this decade was 6.6 hours a week.

In the 1980s, children's television had to be presented through an entertainment-educational format. Singhal and Rogers define entertainment-education as the process of purposely designing and implementing a media message to both entertain and educate in order to increase audience members' knowledge about an educational issue, create favorable attitudes, and change blatant behavior (cited in Rice & Atkin, 2001, p. 343). Repelita IV, a 5-year economic development plan (1984–1988), even stated that children's programs such as *Si Unyil* should be used to socialize Pancasila values among the young generation. Pancasila is the state ideology, referring to the five (*panca*) following principles (*sila*): belief in one and only God, just and civilized humanity, the unity of Indonesia, democracy guided by inner wisdom in the unanimity arising from deliberations amongst representatives of the people, and social justice for the whole of the people of Indonesia.

Kitley (1999, p. 129) argued that "in the politics of state television, so-called children's television becomes part of the machinery of the state hegemony." *Si Unyil* (the boy Unyil), for instance, was the most popular puppet series, broadcast weekly from 1981 until 1993. The program, targeted at children as well as their parents, talked about a variety of issues high on the government agenda such as nationalism, patriotism, health, family planning, environment, tourism, and general elections. The challenge for the producer was to deliver these politically correct messages to the children in a hidden way. The producer also had to consider the visualization, the choice of character, and the puppets' design. Despite the

audience's demand for their appearances, the unsympathetic characters, such as the short-tempered Pak Raden and the lazy Pak Ogah, were not shown too often. Suyadi (1991, p. 1), the Production Director of *Si Unyil*, stated the following: "[w]hen we showed a fight between schoolboys on the screen, protests would come from mothers who thought that it might incite the children to imitate it, to hit someone's head is not ethical, good people ought not to smoke, etc."

Even though the weekly average amount of programming remained similar to the 1970s, government policy made its mark in the proportion of locally produced and imported programs, which should be 80 to 20 per cent, respectively (Armando, 2006, p. 115). Creativity in producing children's programs showed in the popularity of *Si Unyil*, a puppet character that captured the hearts of all Indonesian children. This program's popularity would be used later in the 2000s by Trans7 for their children's encyclopedia programs. So, even with a lower budget than during the previous decade, TVRI managed to capture its young audience with its in-house productions.

The 1990s: The More the Merrier

The competition among TV stations in the 1990s changed the face of children's television in Indonesia. Six national TV stations, competing with one another, all broadcast children's programs because they aimed at families as their market, especially TPI which was granted a license as an educational television station. But, in the early 1990s, the budget for children's programs of commercial TV stations, even for TPI, was limited. The management did not see children's programs as revenue gaining because of the lack of advertising; instead, children's television was seen as a cheap way to fill the weekly schedules. Commercial TV stations preferred to broadcast imported children's programs (from the US or Japan) because they were cheaper than local productions. By way of comparison, the average cost of a locally produced soap opera was US\$11,100 per episode of 30 minutes, whereas the average cost to broadcast a Walt Disney cartoon film was only US\$1,350 per episode at the most (Center for Child Information and Policy Studies [CCIPS], 2002).

During TVRI's monopoly children's television was only broadcast 4.30–6.00 p.m., but the commercial stations extended the time slot in the 1990s (i.e. 1.00–6.00 p.m. on weekdays and 7.30–9.30 a.m. on Sundays). However, children's television kept increasing from 1991 until 1997, from 33 hours to 57 hours per week. Due to Indonesia's economic crisis and political reform, the duration of children's television dropped drastically to 11 hours per week in 1998, but increased to 26.8 hours in the next year. In general, children's television presence increased tremendously during this decade; with an average number of 34.6 hours per week (see Table 1). *Sesame Street*, *Tiny Toones*, *Disney* movies, and *Doraemon* were examples of children's television in this period. *Doraemon*, broadcast by RCTI, became children's number one program for several years after its first broadcast in 1991, and is still on air every Sunday morning at 8.00 a.m. The high rating of *Doraemon* inspired other stations to broadcast more children's programs. At the same time, advertising agencies realized that children have "pester power" or the power to influence (middle class) parents' decisions to buy household supplies, which explains the many advertisements inserted in children's TV programs.

Although imported programs started to dominate children's television, noncartoons were still higher in number compared to cartoons (see Table 1). However, some TV stations

still tried to produce their own children's programs. SCTV broadcast a television magazine program, *Krucil (Kru Cilik – Young Crew)*, that involved children as reporters. RCTI also had a film series, *Sahabat Pilihan (Chosen Best Friend)* telling stories about friendship between two children from different economic backgrounds. TPI produced *Si Komo*, a dinosaur doll character. TV stations still tried to use an entertainment-educational format, with more emphasis on the entertainment side because they had to maintain their market. "We want to teach children some virtues but if we use direct education, it won't be attractive. It must be entertaining," explained our informant who worked for RCTI for years before becoming Head of Programming at Global TV (personal communication, February 6, 2007). Given the harsh competition in the Indonesian television market, commercial stations tried hard to get young audience's attention in order not to lose advertising to their competitors.

The 1990s witnessed dramatic changes in children's television in Indonesia. Commercial stations played a big role in children's television and overshadowed TVRI after two decades of monopoly. The TV industry realized that it could make money from children's television and really took advantage of that. The number of programs, as well as the duration of children's television, increased sharply compared to the previous decade, giving audiences more options than before. Imported programs rivaled local productions, regardless of government regulation stipulating that TV stations should broadcast local programs at least 60% of the total broadcasting time.⁹ Still, commercial stations continued to make efforts to produce good quality children's programs. The proportion of cartoon and noncartoon programs also changed, in that their number was almost equal during this decade.

The Invasion of Cartoons as of 2000

Four new commercial stations entered the TV business in the 2000s. They broadcast 24 hours a day, providing more time slots for children's programs. In 2001 the earliest children's program started at 6.30 a.m. and the latest program ended at 7.00 p.m. In 2009 the earliest show started at 4.30 a.m. and the latest ended at 8.00 p.m. The average amount of children's television in the 2000s reached 137.7 hours per week (see Table 1). Children were granted a lot of choice at every hour of the day; and cartoon programs especially dominated children's television. Imported programs outnumbered the locally produced programs.

Every TV station increased the number of children's programs in this decade (see Table 2). Lativi, the new kid on the block, tried to grab the children's television market through cooperation with the Nickelodeon Network (from 2004 until 2005). Due to financial problems, they lost the cooperation with the Network to Global TV, which dominated children's television between 2006 and 2009. When it was first established in 2005, Global aimed at a teenage audience by cooperating with MTV. But then it realized that "it is difficult to maintain youth audiences' loyalty, and their number is also small" as explained by Global TV's Head of Programming (personal communication, February 6, 2007). Hence, Global TV changed its strategy by expanding its audience segmentation to children, teenagers, and families. Global uses the share revenue method in terms of MTV and Nickelodeon programs, so they don't have to spend money to buy or produce programs.

TV7 (then Trans7) had a different experience. It produced some children's drama when it first started, but *Captain Tsubasa*, an imported cartoon program, was the one proving that a children's program could be profitable. After that, TV7 tried to produce different genres of children's television: feature series, unlike other television stations that only broadcast drama, soap operas, films, cartoons, and variety shows aimed at children.

TABLE 2

Average output of children's television on all stations (in hours per week).

TV Station	1970–1979	1980–1989	1990–1999	2000–2009	Ownership
TVRI	6.8	6.6	6.1	6.2	Public TV
RCTI			6.9	13.8	National private
TPI			12.5	15.2	National private
SCTV			7.5	12.8	National private
Anteve			4.2	16.8	National & foreign private
Indosiar			7.8	13.9	National private
TransTV*				7.5	National private
TV7/Trans7				25.4	National private
Lativi/TVOne*				24.1	National & foreign private
GlobalTV				43.1	National private

*TransTV and TVOne stopped broadcasting children's programs as of 2009.

Bolang (*Bocah Petualang*–*Adventurer Kids*) became the most popular children's program of Trans7, portraying children's daily activities in rural areas in Indonesia. Trans7 also produced *Laptop Si Unyil*, using the most famous character from the 1980s. "The mothers already knew *Si Unyil*, so they watched the program for nostalgic reasons with their children. We designed the program as a children's encyclopedia," explained a program developer of Trans7 (personal communication, March 19, 2007). The latter also explained to us that Trans7 intends to produce more children's television in the years ahead because it is cheaper to produce than to buy imported programs. The case of *Bolang* and *Laptop si Unyil* in Trans7 is extraordinary, because the two programs are produced by the news department, not the production department. TV stations have no special requirements for their in-house production teams. "The only criterion is that you have to be able to work with children if you want to join children's programs production" (a producer of *Bolang*, personal communication, March 15, 2008). But still, they have some shared ethical concerns for their productions, including: not showing violence or inappropriate scenes such as dead animals after being hunted down or naked children (e.g. while swimming).

We were not able to collect complete information on how much profit TV stations make on children's television. By way of illustration, the production of *Si Bolang* has cost Trans7 US\$1,580 per half hour episode, to be broadcast with 10 minutes of advertising, excluding the sponsorship and merchandising revenues (personal communication with a producer of *Si Bolang*, March 15, 2008). GlobalTV only has to spend broadcast cost because of the share revenue method it has used for popular Nickelodeon programs such as *Avatar* *the Legend of Aang* and *SpongeBob SquarePants*, both of which figure on the list of top ten children's programs. Nielsen Media found that children's television received 6 per cent of total television advertising revenue from 2007 until 2008, equal to US\$120–144 million, more than the revenue of sport programs. Given the pattern that the average duration of children's television per week in the present decade increased by 400 per cent compared to the previous decade, and considering that children's television is available all day long, from early morning to late evening, on virtually all channels, it seems fair to assume that children's television in Indonesia is profitable enough for the TV stations.

Today, the market logic has become the dominant power in the performance and conduct rationales for scheduling children's television in Indonesia. The majority of children's television output today consists of imported programs (82 per cent). In general, the stations prefer to buy imported productions to fill their time slots, especially with

successful films or cartoons from big networks like Nickelodeon or Warner. Children's feature series became popular in this decade, but cannot overrule cartoons, which dominate children's television for the first time in children's television history in Indonesia, a phenomenon observed in the US or Europe decades before (Alexander, 2001, p. 496). So far the government has not said much about this situation, neither facilitating nor controlling, and civil society has not influenced this situation at all.

Concluding Remarks

Analysis of the structure of children's television in Indonesia, in terms of its history and regulation, illustrates the lack of a prominent government role in the establishment and development of television in general and children's television in particular. The overview presented here shows quite clearly that regulations have not been able to keep pace with the changes in children's television in Indonesia. The previous four decades have been characterized by a steady increase in children's television, especially after the establishment of commercial stations. Children's television soon became a profitable industry, leading to tight competition over young audiences among commercial stations. As to the diversity of the children's television output, programs with entertainment-education content outnumbered cartoons until the year 2000. After the 1990s cartoons with only entertainment value became synonymous with children's television and dominated children's television after the year 2000.

The conduct of children's television in Indonesia, in terms of developing and producing children's programs, also changed over time. During the TVRI monopoly era, locally produced children's television outnumbered the imported programs, especially in the 1980s, when the government demanded TVRI to produce a minimum of 80 per cent of its broadcasting output. More imported programs were broadcast by commercial stations in the 1990s and the 2000s, first because they were cheaper but then also because they were profitable. Hence, nowadays imported programs dominate children's television in Indonesia. Unfortunately every station seems to have a similar kind of program supply in light of the mimicry strategy adopted by the television stations, especially after a "new" program receives high ratings and generates considerable advertising revenue.

In the commercial television era in Indonesia, civil society appears to have lost its voice in the conduct and performance of children's television. It could influence children's television if it was able to build a coalition and put public pressure on the government (i.e. through KPI and the Ministry of Communication and Information), resulting in the revision of the Broadcasting Act of 2002. Put into practice, the Act of 2002 (i.e. stating that commercial television stations should put their local network station system in place, authorizing each commercial actor to produce 10 per cent local output) could certainly have been a vector for change. But so far this has not been the case, and as long as the government is not going to use its authority to endorse locally produced children's television, the dominance of imported children's programs will persist. Moreover, the amount and variation of children's television as well as the proportion of locally produced and imported children's programs will remain unaffected. In general, the stations considered children's programs as "difficult to produce" and "easier to import" (e.g. from the Jakarta station). To conclude, further government intervention is needed to boost local talent and production pools, but this may very well be an unrealistic prospect in the Indonesian context.

NOTES

1. TVRI, RCTI, SCTV, TPI, Indosiar, AnTV, TVOne, MetroTV, TransTV, Trans7, and GlobalTV.
2. Komisi Penyiaran Indonesia (KPI) is an independent regulatory body of the State that is given authority to manage the broadcasting system in Indonesia.
3. A foundation that actively advocates media education for children in Indonesia.
4. According to AGB Nielsen Media Research one television set in a household is watched by on average five people; in those days 7.6 million sets would mean a potential audience of 38 million or about 20 per cent of Indonesia's population.
5. The economic boom in Asia since the 1980s has created a "new middle class" in Indonesia, "referring to well-educated, affluent urbanites, with structural occupation ranging widely from the petty bourgeoisie to intellectuals, artist, middle ranking bureaucrats, and managerial or technical professionals" (Heryanto, 1999, p. 164).
6. Television shares are measured by AGB Nielsen Media in ten big cities in Indonesia: Jakarta (majority of the respondents), Bandung, Surabaya, Semarang, Medan, Makasar, Yogyakarta, Denpasar, Palembang, and Banjarmasin. Jakarta suffers bad reception quality of TVRI programs because of the position of the antennas. Although many stations, including TVRI, considered that data of TV shares are unreliable, the stations and advertising agencies continue to use them because alternative data are not available.
7. Data are available in rupiah (Indonesian currency) then converted into US dollars (see <http://www.oanda.com/currency/converter/>).
8. In Indonesia, school days are from Monday until Saturday.
9. The Broadcasting Act of 2002, Chapter IV.

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Hendriyani is a junior lecturer at the Communications Department of Universitas Indonesia, Jakarta (Indonesia). She is also a doctoral candidate at the Radboud University Nijmegen (The Netherlands). E-mail: hendriyani.sos@ui.ac.id

Ed Hollander is Associate Professor and Director of Studies at the Faculty of Social-Cultural Sciences of the Radboud University Nijmegen (The Netherlands).

Leen d'Haenens is Professor at the Centre for Media Culture and Communication Technology of the Catholic University of Leuven (Belgium) and lecturer at the Department of Communication Science of the Radboud University Nijmegen (The Netherlands).

Johannes Beentjes is Professor at the Department of Communication Science of the Radboud University Nijmegen (The Netherlands).